

BUSINESS PLANNING AND SUSTAINABILITY QUESTIONS FOR WORKFORCE ORGANIZATIONS

Every organization's leadership, culture and operating environment is unique, and operating environments across different types of workforce organizations are also very different. Each proposed workforce program may present different sets of opportunities and challenges. So while the business planning questions may differ for each case, listed below is a question bank of 30+ planning questions to draw from, organized by 4 business planning goals, which together can help drive the development of a sustainable business plan.

Executive Sponsorship Alignment

Business Planning Goal: Align your program and business proposal as closely as possible with executive sponsors' top priorities and the organization's core mission.

- Who in your organization has been the most engaged **executive-level sponsor** of your HPOG program? Who in your organization will make final decisions on program and business plans moving forward? Are these the same person or not?
- What is important to your executive sponsor(s)? Based on their decisions and actions (not just words), what do they care most about?
- Are there specific elements in your HPOG program that align closely with these priorities? What are they?
- Are there examples of other programs or initiatives that have earned strong executive-level sponsorship support recently? How do these programs/activities align or not align with your HPOG program?
- Does your executive sponsor have control over any specific internal discretionary financial resources that could be allocated towards program sustainability? Could the sponsor redirect internal support systems or internal service providers to engage more actively to help support or sustain your program? Does the sponsor have access to significant external relationships/resources?

Program Performance Assessment

Business Planning Goal: *Assess and deeply understand what specific aspects of your program drive success and individual stakeholders associated with those successes, as well as what aspects don't really help much or impede success.*

- To date, how have your HPOG program's **overall enrollments and education/new job outcomes** performed vs. your originally-proposed goals? Note specific key performance indicators.
- How have your HPOG program's enrollments and education/new job outcomes performed vs. **similar programs** elsewhere in your organization or community? Note specific benchmarking data comparison with comparable programs, if known.

- What **external or environmental factors** have significantly influenced (e.g., either helped or hindered) overall program success? Are these factors “givens” that you cannot change or influence, or is there a possibility that you can change any of them?
- Are there specific sub-groups of the **participant audience** served that have achieved outcomes at significantly higher rates than participants overall? Do you know why?
- Are there specific sub-groups of the participant audience served that have achieved outcomes at significantly lower rates than participants overall? Do you know why?
- Are there **elements of your program’s service delivery strategy** that have worked especially well? Who are the key leaders most closely associated with these services?
- What specific **internal departments or external partners** have performed well? Who are the key individual leaders of these successful departments/partners?
- Are there elements of your program’s service delivery strategy that have not worked well? Do you know why?
- Are there any new or existing **business processes or policies** within your organization or via an external partner that have proven especially effective in serving participants? Who is the process or policy leader responsible for these activities?
- Are there any business processes or policies within your organization or with an external partner that have proven harmful or time-consuming in executing your program delivery model and getting the results you seek? Who has the authority to change them? Can these processes or policies be changed, or are they required by external authorities?
- What specific **employers** have hired multiple participants from your program? Who specifically within employer organizations are your biggest champions or advocates? Have you measured any business results for these employers, such as recruiting cost savings, employment retention, performance, or promotions of your program participants?

Program Financial Assessment

Business Planning Goal: *Identify the outline of a business case or business model that can help persuade resource decision-makers to support investments in a continued program.*

- Based on your program assessment above, what are the **estimated direct costs** associated with the most successful program elements or activities? These are potential investment opportunities to sustain your program.
- Based on your program assessment above, what are the estimated direct costs associated with the least successful program elements or activities? These are potential expense reductions.
- Are there aspects of your current program activities or processes that are less **efficient** than they could be? How might you increase efficiencies?
- Are there any **positive business outcomes** for your organization that flow naturally from your program’s success (e.g., performance-based funding, tuition revenues, etc.)? Can you calculate your program’s influence on these business results?

- Based on program results and your overall program budget, what is the **cost-per-enrolled participant** for your current program design? What is the cost-per-successful participant? Do per-person costs decrease at greater service volumes?
- What are the largest and most important **non-renewable expense categories** that are at risk when the grant funding expires? Are there alternative sources within your organization for anything that looks like this resource?

Resource Landscape Assessment

Business Planning Goal: *Identify potential sources of renewable funding or other in-kind support that can comprise a new business model to sustain your program.*

- Do **program participants** pay any of the costs for your program currently? Could they pay a portion? Are there any policies that restrict your organization for charging participants for special services? If so, does your program currently fund external strategic partners whose costs might be shifted towards a partial user pay model?
- Have you asked **successful program completers or graduates** to make a contribution to your program in the form of a financial donation or volunteer service to help future program participants?
- Ask your internal stakeholder group to help identify potential **internal sources of funding or in-kind support** that could sustain your program. Do any of them control or influence access to these resources or in-kind services?
- Do you have **strategic partners** for your program who provide services that are grant-funded? To what extent might they be able to generate some or all of the funding for their program services? Are there external strategic partners who might be able to leverage other funding sources for support services currently performed internally?
- Are there any specific kinds of funded program activities or services that a **volunteer** might perform with little diminishment of performance or risk? What organizations in your community can help recruit volunteers?
- Are there regional **private or corporate foundations** whose philanthropic mission aligns with your program's goals?
- Do your **employer-partners** have corporate foundations or philanthropic programs? Does their HR department pay "employee hiring referral bonuses" that your program might tap when you place participants in new jobs? Might your champion help propose a renewable resource request from somewhere within the organization?
- Does your organization have any departments or service units that specialize in **fundraising events** that might help with a fundraising event for your program? What are their results?
- Does your program currently hold any large-scale events such as program graduations, orientations, or job fairs that might be attractive for a **sponsor to help underwrite**? What kinds of sponsoring organizations might like to have their names associated with such an event?